**CA-PMM**

**Project Name:** Business Information System (BIS)

**OCIO Project #:** 5225-93
**Department:** CDCR
**Reporting Period:** *From:*                    *To:*

# Team Member to Project Manager

## Current Task Summary

| Task or Deliverable | Scheduled Completion Date | Actual Completion Date | Issues? |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Accomplished this week**

|  |
|---|
|  |

**Planned/Scheduled Completion in Next Two Weeks**

|  |
|---|
|  |

| Status Summary | Yes/No | Explanation |
|---|---|---|
| Will all assigned tasks be accomplished by their due date? |  |  |
| Are there any planned tasks that won't be completed? |  |  |
| Are there problems which affect your ability to accomplish assigned tasks? |  |  |
| Do you plan to take time off that is not currently scheduled? |  |  |

## Status of Assigned Issues

| Issue Number | Description | Due Date | Status |
|---|---|---|---|

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# Team Member to Project Manager

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| --- | --- | --- | --- |
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# CA-PMM

**Project Name:** Business Information System (BIS)

**OCIO Project #:** 5225-93

**Department:** CDCR

**Reporting Period:** *From:* 7/1/09   *To:* 7/31/09

# Project Manager to Sponsor

## Current Status Report

| Questions | Yes/No | Cause | Impact | Action Required |
|---|---|---|---|---|
| 1. Were recent milestones completed on schedule? | No | Integration testing of Shift Management tool has been delayed | Delay in planned Non-Productive and Productive Go Live of Shift/Time pilot for the Institutions | Complete Integration testing by 7/3/09 |
| 2. Were any key milestones or deliverables rescheduled? | Yes | UAT start has been rescheduled to 7/6/09 | Non-productive and productive Go Lives for shift/time pilot will be delayed by a month | Ensure completion of integration testing by 7/3/09 so UAT can be started 7/6/09 |
| 3. Was work done that was not planned? | Yes | Change in the deployment approach | Additional tasks within current project scope | Prepare relevant documentation |
| 4. Were there any changes to scope? | Yes | Release 1C (TPA) for CPHCS has been modified from the original scope | Planned Go Live for Release 1C/TPA is now 10/1/09 | Complete scheduled project tasks related to 1C/TPA plan |
| 5. Were tasks added that were not originally estimated? | Yes | 1C/TPA related project tasks were added to meet the modified business requirements for medical invoice payments | Planned Go Live date for 1C/TPA will now be 10/1/09 | Complete scheduled project tasks related to 1C/TPA plan |
| 6. Were any tasks or milestones removed? | Yes | Project tasks (such as AD integration) related to original scope of 1C/TPA were removed to reflect new scope and schedule | Release 1C/TPA schedule has been modified to fit the new scope and approach | Realign new project tasks with the overall deployment schedule |

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# Project Manager to Sponsor

| | | | | |
|---|---|---|---|---|
| 7. Were any scheduled tasks not started? | Yes | Planned UAT related tasks for Shift/Time pilot were not started/completed | Delayed Go Lives for Shift/Time pilot for the institutions and delayed business benefits | Ensure completion of integration testing by 7/3/09 so UAT can be started 7/6/09 |
| 8. Are there any new major issues? | Yes | UAT had to start 6/8 in order to meet the current/projected go live dates. UAT start has been pushed to 7/6 to accommodate completion of critical project tasks | Since UAT did not start 6/8, UAT completion date will be delayed further impacting the non-productive pilot and production pilot go lives | Project team complete UAT prep work by 7/3/09 |
| 9. Are there any staffing problems? | Yes | 4 Technical project vacancies and 3 Functional project vacancies (excluding blanket and field positions) need to be filled | If the current vacant positions are not filled by end of July 2009, project work will be impacted | Hiring activities have started |

## Look Ahead View

| Questions | Yes/No | Impact | Action Required |
|---|---|---|---|
| 1. Will upcoming critical path milestones or deliverables be delayed? | Yes | The current project end date needs to be revised to accommodate the changed approach from functionality-based rollouts to institutional-based rollouts | Discussions on rollout strategy and revisions to schedule and budget |
| 2. Do any key milestones or deliverables need to be rescheduled? | Yes | Rescheduling milestones and deliverables will have an impact on the remaining schedule and budget | Key milestones and deliverable due dates need to be revised to reflect the new approach and rollout strategy for the remaining non-pilot sites |

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# Project Manager to Sponsor

| | | | |
|---|---|---|---|
| 3. Is there any unplanned work that needs to be done? | Yes | Rollout strategy, resource planning, and scheduling will need to be finalized | Internal (with the business stakeholders) and external meetings (with control agencies and OCIO) need to be scheduled to obtain necessary guidance and approvals |
| 4. Are there any expected or recommended changes to scope? | Yes | Release 1C scope has been modified to include interfaces to TPA system (instead of Prodagio) | Build new architecture and interfaces around the new scope |
| 5. Are there any tasks not originally estimated that will need to be added? | Yes | Depending on the revised rollout strategy, additional tasks and milestones may need to be added to the revised schedule | Define rollout strategy, identify project tasks, assign resources, and develop an updated schedule |
| 6. Are there any tasks or milestones that should be removed from the plan? | Yes | Changes in tasks and deliverables will impact the current contract from a deliverables as well as payment standpoint | Realigning current project deliverables and milestones with the revised contract is currently being done |
| 7. Are there any scheduled tasks whose start will likely be delayed? | Yes | The revised rollout/deployment strategy will necessitate a revision to the scheduled task start dates and durations | A revised project schedule will need to be developed after the rollout strategy is finalized |
| 8. Are any major new issues foreseeable? | Yes | Potential impacts on future contracts, resources, and budgets need to be addressed in the planning session | Potential issues around integration, resource availability, and contracts need to be addressed effectively |
| 9. Are any staffing problems anticipated? | Yes | Additional resources may be required to support the extended deployment of the rollouts | Right-skilling and right-sourcing of resources that align with the deployment of the remaining rollouts need to be completed |

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# Project Manager to Sponsor

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**Reporting Period:** *From:* 7/1/09 *To:* 7/31/09

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**Current Status and Accomplishments:**
*Describe deliverables completed and milestones met during* **this reporting period.**

Completion of UAT for 213/215/Exhibit Changes; TPA functional specs signoff

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**Project Milestones:**
*List key milestones and their dates from the project schedule.*

| Milestone | Target Date | Forecast Date | Status | Cause & Impact to Implementation Date | Date Completed |
|---|---|---|---|---|---|
| Implement Forms 213/215 (Standard Agreements Summary) and Exhibit Changes (for contracts) in BIS | 7/31/09 | 8/15/09 | In Progress | Due to year-end activities in the business and related reconcilation related work in the business, UAT has been pushed back. Minimum impact to business | |
| UAT for shift/time management | 7/1/09 | 8/15/09 | In Progress | UAT delayed because of pending development work. Has caused delay in the Go Live date for Shift/Time | |
| TPA Functional Specs development and sign off | 6/30/09 | 7/1/09 | Completed | | 6/30/09 |

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# Project Manager to Sponsor

| **Variances** Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance". | | | | |
|---|---|---|---|---|
| | **On Plan <5%** | **Caution 5-10%** | **Significant Variance >10%** | Action Required |
| Schedule | | | X | Finalize rollout deployment approach and strategy. Develop implementation schedule, resource requirements, and budget |
| Milestones | | | X | Revise project milestones based on the revised/updated project schedule for the rollouts |
| Deliverables | | X | | Deliverables for the remaining rollout implementation will have to be scheduled according to the revised project schedule |
| Resources | | X | | Project resources have to be aligned with the revised project schedule after finalizing the rollout approach |
| OneTime Cost | X | | | Budget impact/changes have to be identified to the revised project schedule and deployment approach |
| Continuing Cost | X | | | No significant changes in support costs are anticipated because of the revised project schedule |

**CA-PMM**

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**Reporting Period:** _From:_ 7/1/09 _To:_ 7/31/09

# Sponsor to Executive Committee

## Summary Milestones and Highlights

**Project Milestones:**
_List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind._

| Milestone | Target Date | Forecast Date | Status | If Delayed, Impact to Implementation Date | Date Completed |
|---|---|---|---|---|---|
| Implement Forms 213/215 (Standard Agreements Summary) and Exhibit Changes (for contracts) in BIS | 7/31/09 | 8/15/09 | In Progress | UAT testers from business not available due to schedule | |
| UAT for shift/time management | 7/1/09 | 8/15/09 | In Progress | UAT delayed because of pending | |
| TPA Functional Specs development and sign off | 6/30/09 | 7/1/09 | Completed | | 6/30/09 |

**Variances**
Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".
\* _Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis_

| | On Plan <5% | Caution 5-10% | Significant Variance >10% | Action Required |
|---|---|---|---|---|
| Schedule | | | X | Finalize rollout deployment approach and strategy. Develop implementation schedule, resource requirements, and budget |
| Milestones | | | X | Revise project milestones based on the revised/updated project schedule for the rollouts |
| Deliverables | | X | | Deliverables for the remaining rollout implementation will have to be scheduled according to the revised project schedule |
| Resources | | X | | Project resources have to be aligned with the revised project schedule after finalizing the rollout approach |
| One Time Cost | X | | | Budget increases have to be identified to the revised project schedule and deployment approach |
| Continuing Cost | X | | | No significant changes in support costs are anticipated because of the revised project schedule |

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**Monitoring Vital Signs Scorecard**

| Vital Sign | Variance | Value | Your Score | Score Justification |
|---|---|---|---|---|
| 1. Customer Buy-In | High Degree of Buy-In | 0 | **1** Yellow | The site-based deployment approach has introduced new transition issues as well as delayed realization of business benefits. |
| | Medium Degree of Buy-In | 1 | | |
| | Low Degree of Buy-In | 2 | | |
| 2. Technology Viability | Strong Viability | 0 | **0** Green | |
| | Medium Viability | 1 | | |
| | Weak Viability | 2 | | |
| 3. Status of the Critical Path (delay) | <5% | 0 | **1** Yellow | The site-based deployment approach has resulted in schedule slippages along the critical path and project end date. |
| | 5% to 10% | 1 | | |
| | >10% | 2 | | |
| 4. Cost-to-Date vs. Estimated Cost-to-Date (higher) | <5% | 0 | **0** Green | |
| | 5% to 10% | 1 | | |
| | >10% | 2 | | |
| 5. High-Probability, High-Impact Risks | 0 to 3 | 0 | **1** Yellow | Project risks associated with the project stem from the organizational transition requirements and business transformation related system adoption issues. |
| | 4 to 6 | 1 | | |
| | >6 | 2 | | |
| 6. Unresolved Issues (on time resolution) | On time | 0 | **2** Red | Issues in the project in the areas of organization transition and deployment schedule for the remaining sites will impact critical path to completion. |
| | Late with no impact | 1 | | |
| | Late impacting the critical path | 2 | | |
| 7. Sponsorship Commitment | Fully engaged | 0 | **1** Yellow | The new BIS sponsors are driving renewed partnership between the business stakeholders and the project team. |
| | Partially engaged | 1 | | |
| | Inadequate engagement | 2 | | |
| 8. Strategy Alignment | Strong alignment | 0 | **0** Green | |
| | Partial alignment | 1 | | |
| | Weak or no alignment | 2 | | |
| 9. Value-to-Business | Strong | 0 | **1** Yellow | Until the end-to-end solution is deployed across CDCR, the Business benefits of BIS will not be fully realized. |
| | Medium | 1 | | |
| | Weak | 2 | | |

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| | | | | | |
|---|---|---|---|---|---|
| 10. Vendor Viability (provide rationale for the rating in the field following the scorecard) | Strong | 0 | **1** | Yellow | The vendor has gaps in the Organizational Change Management (OCM) and PM areas that have had a negative impact on the project. |
| | Medium | 1 | | | |
| | Weak | 2 | | | |
| 11. Milestone Hit Rate (rate of achievement as planned) | >90% on time | 0 | **2** | Red | Under staffing, steep learning curve associated with SAP, and task dependencies in the schedule will have a drag effect on the team's ability to meet critical milestones. |
| | 80-90% on time | 1 | | | |
| | <80% on time | 2 | | | |
| 12. Deliverable Hit Rate (rate of production as planned) | >90% on time | 0 | **1** | Yellow | Under staffing, under skilling, and task dependencies in the schedule will have a drag effect on the team's ability to meet critical milestones. |
| | 80-90% on time | 1 | | | |
| | <80% on time | 2 | | | |
| 13. Actual vs. Planned Resources | >90% assigned and available | 0 | **1** | Yellow | The timely completion of project tasks and the sustainable support of BIS is dependent on filling the current staff vacancies and skill gaps. |
| | 80-90% assigned and available | 1 | | | |
| | <80% assigned and available | 2 | | | |
| 14. Overtime Utilization (% of effort that is overtime) | <15% | 0 | **1** | Yellow | The aggressive project timeline necessitates about 20% overtime work to accommodate deadlines. |
| | 15-25% | 1 | | | |
| | >25% | 2 | | | |
| 15. Team Effectiveness | Highly Effective | 0 | **1** | Yellow | Given the complexity of the project and the high level of integration required between teams, team dynamics has a steeper learning curve and lengthy maturation process. |
| | Moderately Effective | 1 | | | |
| | Ineffective | 2 | | | |
| | **Total** | | **14** | **Y** | |

_Green = 0 - 8_
_Yellow = 9 - 19_
_Red = 20+_

**Vendor Viability Rating Rationale**

The Vendor's leadership and effectiveness in implementing Organization Change Management (OCM) methodologies and techniques have been low resulting in poor stakeholder management. In addition, the vendor's Knowledge Transfer (KT) effectiveness has been low which may result in a difficult program transition for CDCR. IBM introduced a new Project Director on 07/28/2009.